George Mason University Center for Regional Analysis

Forecasts for the Reston/Dulles Rail Corridor and Route 28 Corridor 2010 to 2050

Prepared for the Fairfax County Department of Planning and Zoning

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Introduction

George Mason University's Center for Regional Analysis has developed forecasts for the Reston-Dulles Rail Corridor and the Route 28 Corridor as part of Fairfax County's work to update the Comprehensive Plan. The Center for Regional Analysis was established in 1992 with the principal mission of providing research and analytical services to local governments and businesses in the Washington region, focusing on economic, demographic, housing and fiscal trends and forecasts. The Center frequently conducts special studies and research for area governments, businesses and institutions.

Objectives and Purpose of Forecasting Project

This work was undertaken for Fairfax County as part of its process to update the County's Comprehensive Plan for the rail corridor from Wiehle Avenue to the Route 28/CIT station area and for the Route 28 corridor south of the rail corridor. The process to update the County's plan for these areas was undertaken to incorporate the extension of Metrorail through Tysons Corner out to Washington Dulles International Airport.

The purpose of the forecasting project was to develop forecasts of development activity for 2020, 2030, 2040 and 2050 that represent likely market feasibility in the context of overall future development in the Washington metropolitan area, Northern Virginia, and Fairfax County. The forecasts are intended to provide reasonable market expectations of development, time-sequenced to assist the County in developing a final comprehensive plan for development and for infrastructure requirements.

Overview of Methodology and Assumptions

Forecasts of population, households, jobs, residential development and non-residential (i.e. office, retail, hotel and other) development were generated for the two rail corridors and for the four Metro station areas that make up the Reston-Dulles corridor (Wiehle Avenue, Reston Parkway, Herndon-Monroe and Route 28/CIT.) These corridor and station area forecasts were developed through a combination top-down, bottom-up approach. The following describes the methodology and assumptions used in the forecasting process:

1. **Develop household and job forecasts for the Washington metropolitan area and for Fairfax County to 2050.** The Center for Regional Analysis used NPA, Inc. econometric forecasts of households and jobs for the Washington metropolitan area and the region's counties for the period 2010–2030. The NPA, Inc., forecasts were extended

to 2050 and growth rates from these forecasts were applied to COG Round 7.1 household and job totals for 2010 to develop 10-year forecasts out to 2050 at the metropolitan and County levels. The growth rates implied by the NPA, Inc. forecasts were compared with other forecasts done by Global Insight to ensure they were reasonable. These County forecasts form the basis for the corridor and station area forecasts.

2. **Develop household and job forecasts for the Reston-Dulles rail corridor and the Route 28 corridor.** Over the next 40 years, the two corridors will capture some share of County household and job growth. It was assumed that the share of County development in these two corridors would increase over time. These assumptions were based on an assessment of the relative attractiveness of the two corridors and the timing of the completion of the Metrorail project. Also considered was the planned growth in other employment and household centers in the County and in other parts of the metropolitan area that would compete with these corridors for future growth.

3. **Generate population forecasts and office, retail, hotel and other job forecasts for the two corridors.** Population forecasts were generated based on assumptions about trends in average household sizes for the County and the two corridors over the next 40 years. It was assumed that average household sizes in the two corridors would decline slightly over the forecast period.

   The vast majority of jobs in the two corridors are forecasted to be office jobs, as those are the types of jobs generally attracted to areas around Metro stations. Forecasts of other types of jobs were based on assumptions about the relationships among office, retail and hotel employment, as well as the existing job mix in the corridors. The overall mix of jobs forecasted for the two corridors was compared to the mixes in other regional activity centers, as well as to the employment mix implied by current County plans and COG forecasts.

4. **Generate residential and non-residential (i.e. office, retail, hotel and other) development forecasts.** Residential development in the two corridors was forecasted by assuming an average of 1,500 square feet of residential space per household. While multi-family residential projects will have somewhat smaller units sizes (e.g. between 1,000 to 1,200 square feet), these large buildings will also have common space that needs to be included in the residential square footage totals. In addition, there will be demand for townhouses within the corridor boundaries, and these townhouses will have somewhat larger unit sizes.

Office development forecasts were based on 300 square feet of office space per office job, while retail development assumed 450 square feet per retail employee. Hotel space was forecasted based on roughly 750 square feet per hotel employee, with additional space for conference facilities. These assumptions are fairly standard in the Washington metropolitan area and most urban and suburban environments.

5. **Given the corridor forecasts, generate forecasts for each Metro station area.** Each of the four Metro station areas will experience development differently over the next 40 years. There will be a different mix of residential and non-residential development, and the timing of development will be different. Based on an analysis of the existing development in the four Metro station areas and the timing of the completion of Phases I and II of the Metrorail project, the corridor forecasts were divided up among the station areas. In the initial phases of preparing the forecasts, an even mix of residential and non-residential development was considered an ideal for some areas. However, given the current mix of development, the study area boundaries, and the market demand for housing and commercial space, a 50/50 split between residential and non-residential development did not come to fruition for any one station area in the final forecasts.

   The following highlights some of the assumptions used in generating forecasts for each station area:

   - **Wiehle Avenue:** Given how the Wiehle Avenue Metro station area boundary is drawn, there is currently no residential development at Wiehle Avenue. (Obviously, there are homes near the proposed Wiehle Avenue Metro station but they do not fall within the boundary defined for this study.) Wiehle Avenue is part of Phase I of the Metrorail project and, as a result, will attract development sooner than will some other Metro station areas. Given its proximity to the office and retail hub of Tysons Corner—and the regional demand for housing—the Wiehle Avenue Metro station area will attract residential development first, followed by office and retail development. It is forecasted that development in the Wiehle Avenue Metro station area will be split rough 40/60 (residential/non-residential) by 2050.

   - **Reston Parkway:** The Reston Parkway station will be completed as part of Phase II of the Metrorail extension. Reston is already a regional destination and will attract both residential and non-residential development. Given the regional demand for housing, residential development will occur somewhat sooner than non-residential development. It is anticipated that in the Reston Parkway Metro

station area, development will be split about 40/60 (residential/non-residential) by 2050.

- **Herndon-Monroe:** Herndon-Monroe will also attract residential and commercial development, but later than either Wiehle Avenue or Reston Parkway. Due to the location of the park and ride facility and the existing neighborhoods, the Herndon-Monroe station will attract more residential than non-residential development and will have a split of about 60/40 (residential/non-residential) development by 2050.

- **Route 28/CIT:** Route 28/CIT is the westernmost station in Fairfax County along the new Metrorail line. Its location with good access to both the airport and the Route 28 corridor make it an attractive location for office and other commercial development. This station will attract development somewhat later than either Wiehle Avenue or Reston Parkway. In 2050, it is anticipated that development will be split about 40/60 (residential/non-residential) in the Route 28/CIT Metro station area.

6. **Develop High and Low forecasts.** A range of forecasts for the two corridors was developed using a confidence interval approach, with Low and High forecasts for each 10-year period at 75% and 125% of the growth increment of the Intermediate forecasts. In addition, for the High forecast of households in the Reston-Dulles rail corridor, the 125% growth increment was adjusted to reflect even more residential growth potential, with the ratio of jobs to households reaching a level of 4.5 in 2050. This High forecast of households for the Reston-Dulles corridor approaches the jobs-household ratio in the Rosslyn-Ballston rail corridor in Arlington County.

Jobs-Housing Balance

Contemporary master plans often have a goal of improving in the jobs-housing balance as a means of reducing travel demand and creating more livable communities. Public policy cannot dictate where individuals live and work; however, if there is a balance of housing and jobs in a growth center there will be a greater share of residents commuting to close-by jobs. The means to achieve a better jobs-housing balance are not exact science and public policies aimed at this objective have often had to address significant political challenges.

Job-household ratios vary significantly depending on what geography is used. At the Washington metropolitan scale, there are approximately 1.6 workers (jobs) per household. Employment centers by their historical nature have fairly high job-household ratios, and there are efforts in many metropolitan areas to try to get more housing near or in these employment centers to reduce the amount of commuting, and, therefore, traffic congestion. There is no

magic number since the true balance would not only match overall supply of housing with jobs, but would also match housing by price level to wage levels of the jobs. In 2010, the Reston-Dulles rail corridor has a job-household ratio of 11.5 (i.e. there are currently 11.5 jobs for every one household in the corridor.) This ratio would decline to 5.6 under the intermediate forecasts.

It is important to remember that these job-household ratios are highly dependent on the way the study area boundaries are defined. Because there is a significant quantity of housing just outside the study area boundary, the job-household ratio would be lower if the study boundary was expanded to include more of these residential neighborhoods.

Forecasts for the Region and Fairfax County

Population and job forecasts for the Washington metropolitan area, Northern Virginia and Fairfax County are shown in Figures 1 and 2, respectively. The metropolitan area is expected to grow from an estimated level of 5.4 million people in 2010 to a forecast level of 8.3 million people in 2050. Northern Virginia would grow from 2.4 million to 3.9 million, and Fairfax County's population would increase from 1.03 million to 1.56 million. The number of jobs is forecasted to increase from 3.3 million in 2010 to 5.7 million in 2050 for the metropolitan area, with Northern Virginia increasing from 1.4 million to 2.6 million jobs, and Fairfax County growing from 680,000 to 1,280,000 jobs by 2050.

Over the 40-year period of 1970 to 2010, Fairfax County has grown by 600,000 people and 530,000 jobs. It has transformed from a suburban residential county to a major urban county with significant job centers and increasing residential development in higher densities to accompany its job centers. We believe that for the next forty years that its job growth will exceed its population growth, and this is reflected in the forecasts for the County to 2050. The growth for the past 40 years compared to the forecasts for the next 40 years are shown in Figure 3.

Figure 1
Population, 2000 - 2050

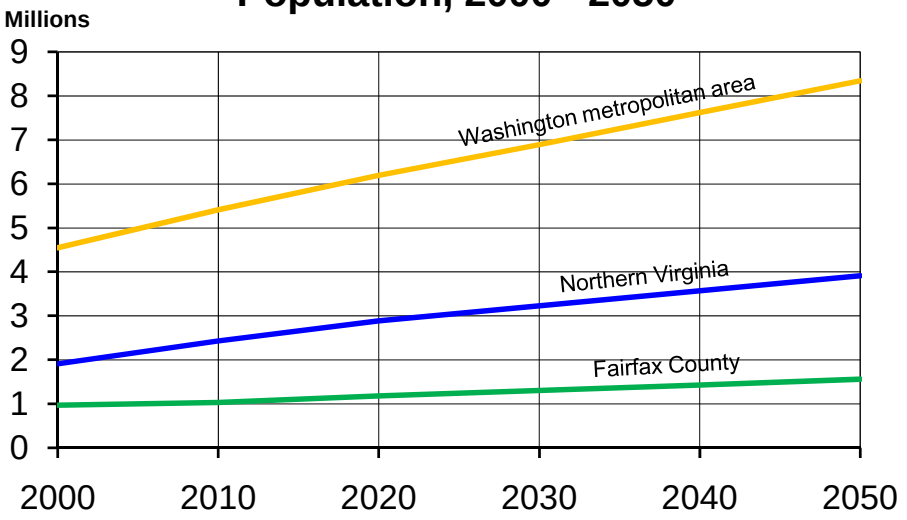
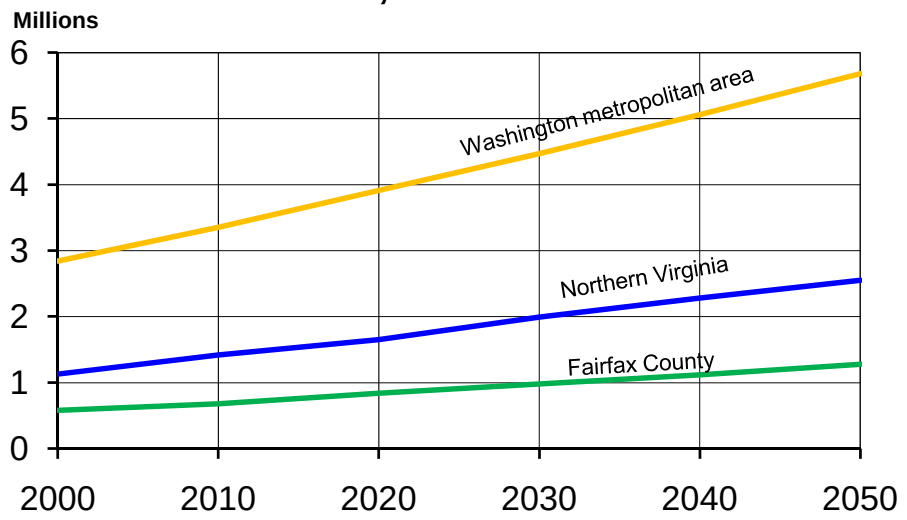
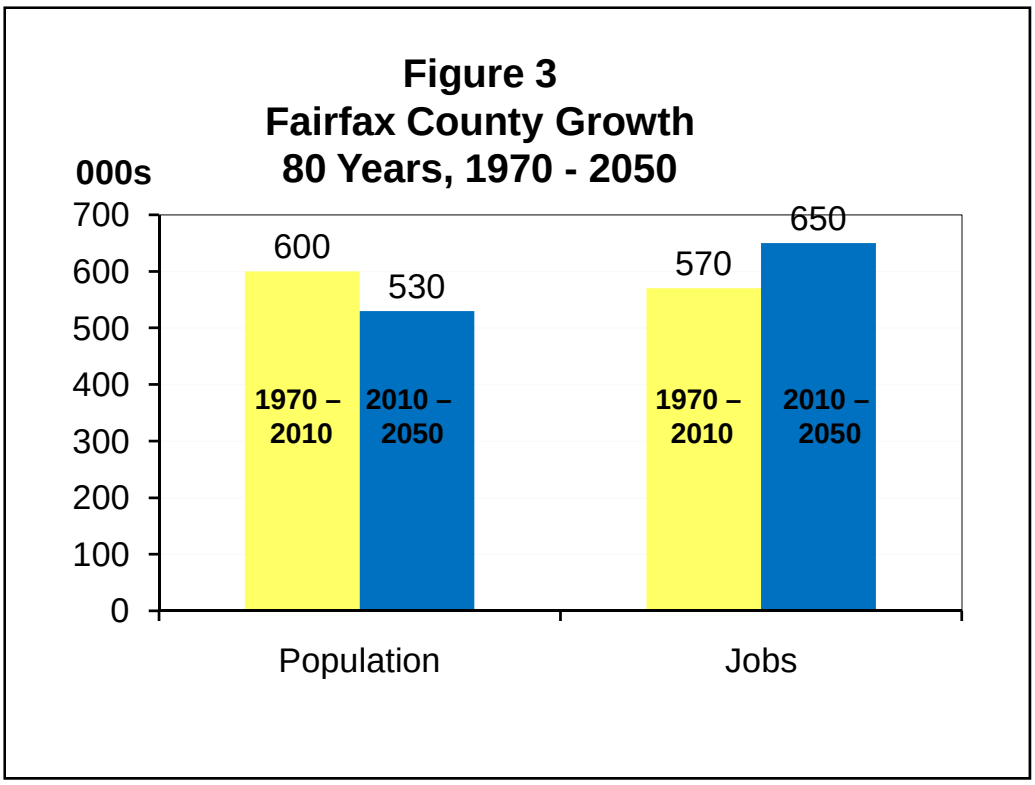


Figure 2
Jobs, 2000 - 2050





2010 to 2050 Forecasts for Reston-Dulles Rail Corridor and Route 28 Corridor

Reston-Dulles Corridor

Reston is already a major center for population and jobs within the region and with the extension of Metrorail to Dulles Airport and the construction of four stations, the Reston-Dulles rail corridor will be an even larger growth complex for the next few decades. The presence and growth of Tysons Corner to the East, the continuing expansion and growth of air travel service at Dulles, the identity of Reston as a center all combine with the extension of rail to create the potential for one of the most dynamic growth corridors in America.

In 2010, there are approximately 97,600 jobs and 8,500 households in the Reston-Dulles corridor. By 2030, the planning horizon for the County's two on-going corridor studies, the Reston-Dulles Corridor is forecasted to have 137,000 jobs and 18,200

households. These forecasts translate into 27.3 million square feet of residential development and 46.2 million square feet of non-residential development by 2030.

By 2050, the end of the forecast period for this study, it is forecasted that the corridor will have over 183,200 jobs and 32,700 households. These job and population forecasts translate into 50.6 million square feet of residential development and 67.0 million square feet of non-residential development in the Reston-Dulles Corridor by 2050. About two-thirds of the non-residential development (47.2 million square feet) is forecasted to be office development. With the exception of some future institutional/government/other space in the Reston Parkway and Wiehle Avenue station areas, the remainder of the non-residential development is retail and hotel space. Retail along the corridor will serve both office workers and residents. However, the amount of retail space was forecasted based on standard relationships between office and retail jobs in employment centers. Hotel space was also forecasted in relation to the amount of office space, as well as with consideration of the need for additional hotel/conference space near Dulles Airport.

Route 28 Corridor

In 2010, the Route 28 corridor contains about 79,800 jobs and 4,400 households. In 2030, the Route 28 corridor will have about 110,700 jobs and 5,400 households. As a result, these forecasts suggest there will be about 8.1 million square feet of residential development and 41.2 million square feet of non-residential development in the Route 28 Corridor by 2030.

By 2050, there will be approximately 150,100 jobs and 6,400 households in the Route 28 corridor. These forecasts translate into 9.6 million square feet of residential development and 55.6 million square feet of non-residential development, including 38.0 million square feet of office space. The remainder of the non-residential space includes some institutional/government/other space, but is mostly comprised by retail and hotel space. The forecasted retail development would largely serve future office workers in the corridor. Given the forecasted employment growth and the proximity to Dulles Airport, the demand for hotel space in the later years of the forecast period was expected to be fairly substantial.

Detailed forecasts for the Reston-Dulles Rail Corridor, the four Metro station areas, and the Route 28 Corridor are provided in the Appendix and an overview of the forecasts for each major forecast item are shown in the figures below.

Figure 4
Reston-Dulles Rail Corridor
Households Forecast Range, 2010 - 2050

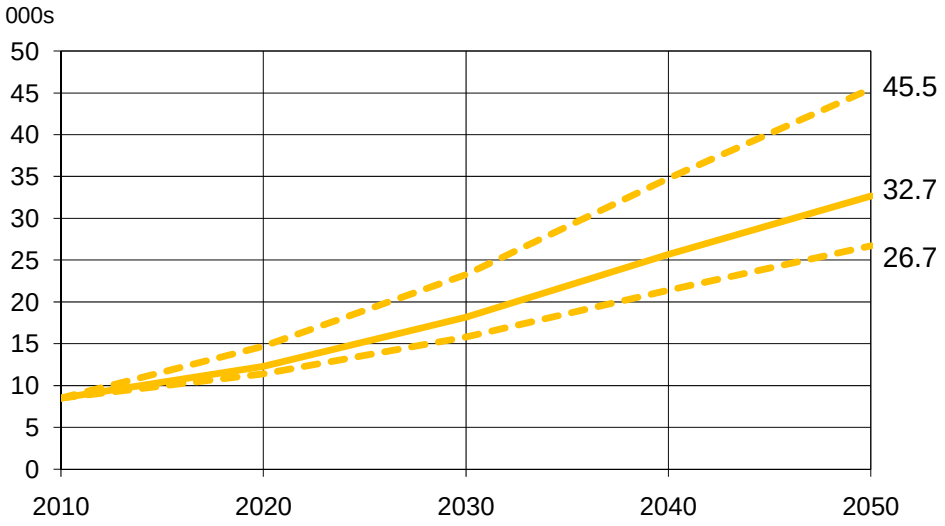


Figure 5
Reston-Dulles Rail Corridor
Employment Forecast Range, 2010 - 2050

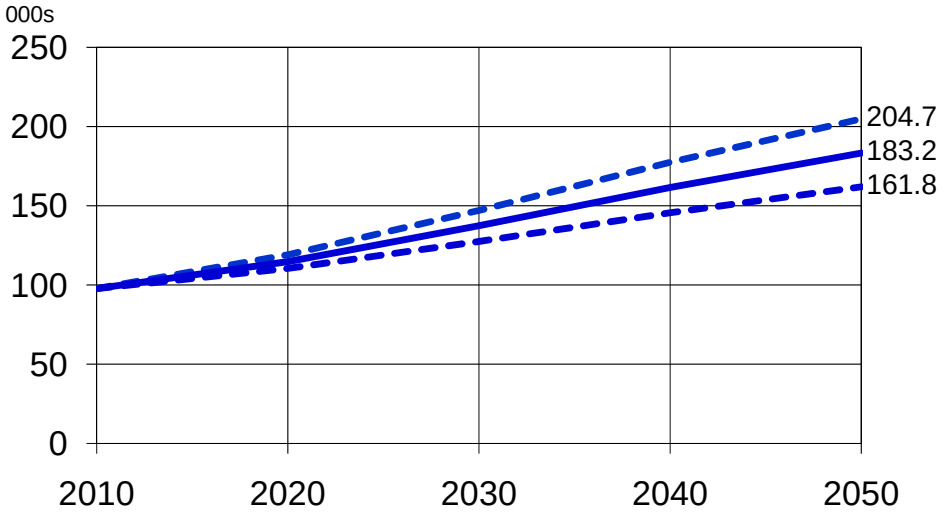


Figure 6
Reston-Dulles Rail Corridor
Household Forecasts

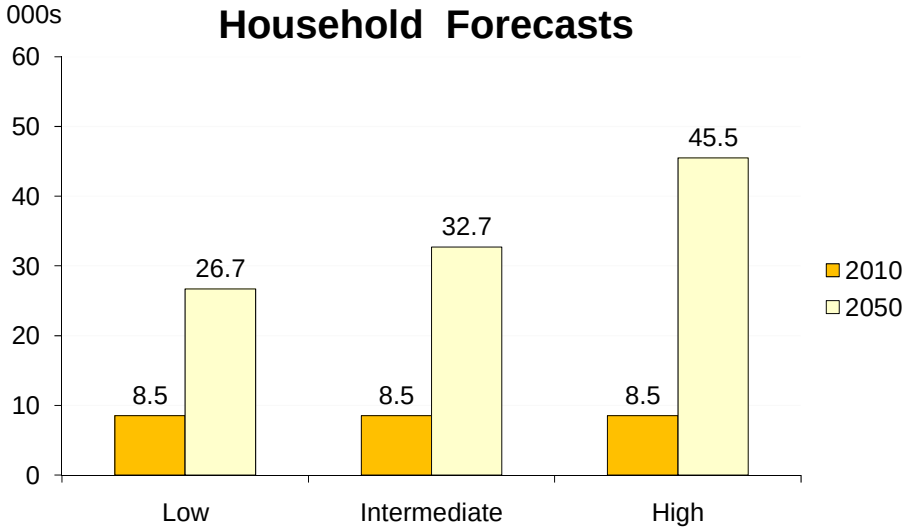
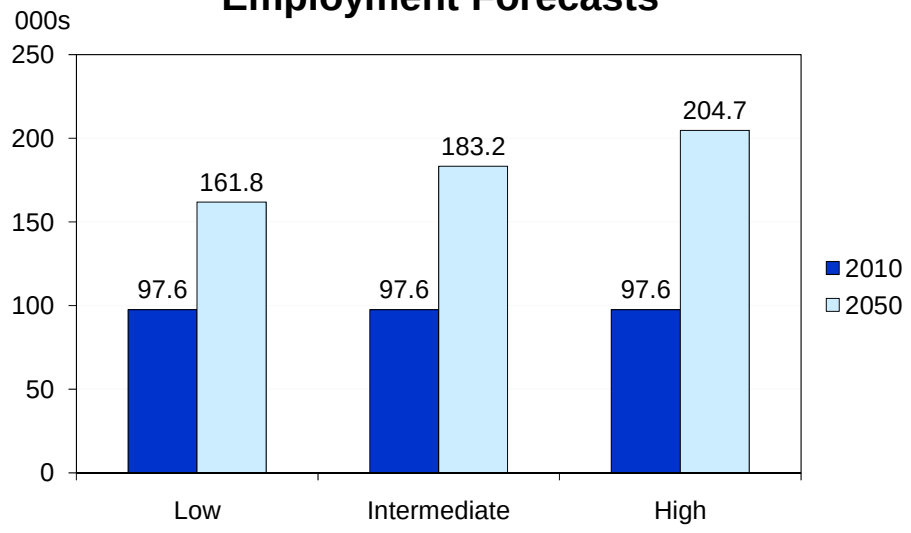


Figure 7
Reston-Dulles Rail Corridor
Employment Forecasts



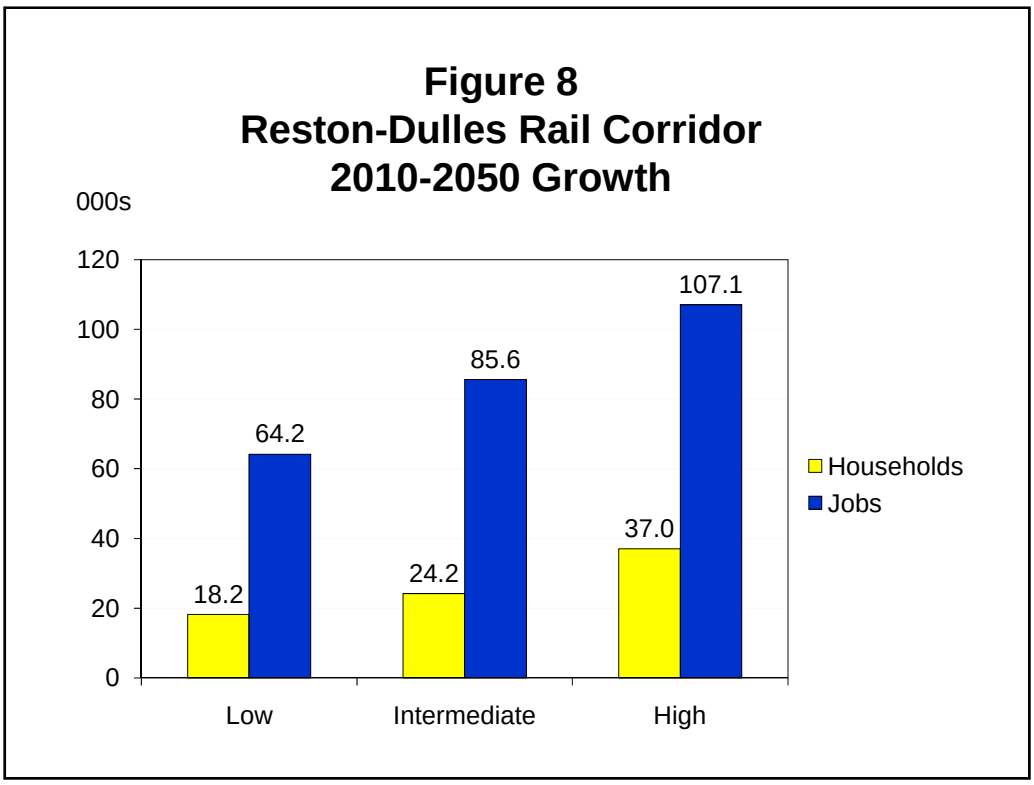


Figure 8
Reston-Dulles Rail Corridor
2010-2050 Growth
000s
120
100
80
60
40
20
0
18.2
64.2
24.2
85.6
37.0
107.1
Low
Intermediate
High
Households
Jobs

Figure 9
Wiehle Avenue Metro Station Area
Households Forecast Range, 2010 - 2050

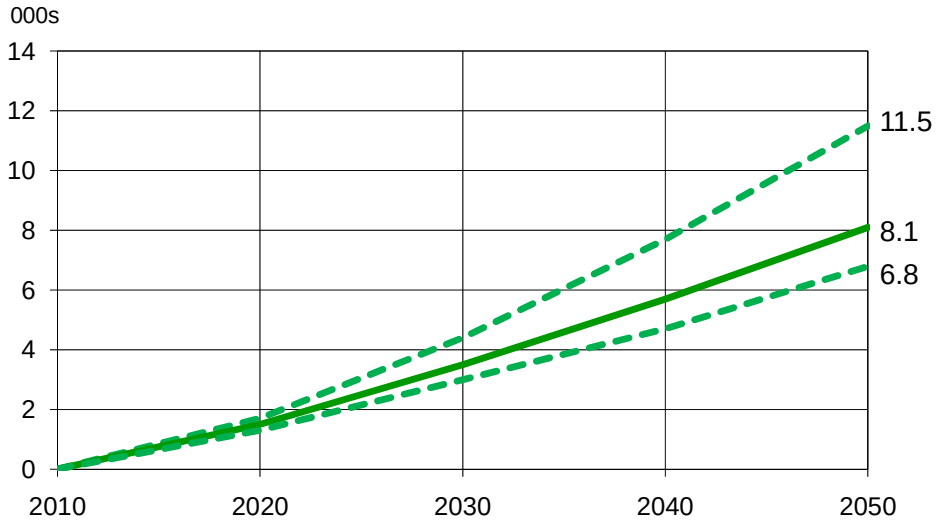


Figure 10
Wiehle Avenue Metro Station Area
Employment Forecast Range, 2010 - 2050

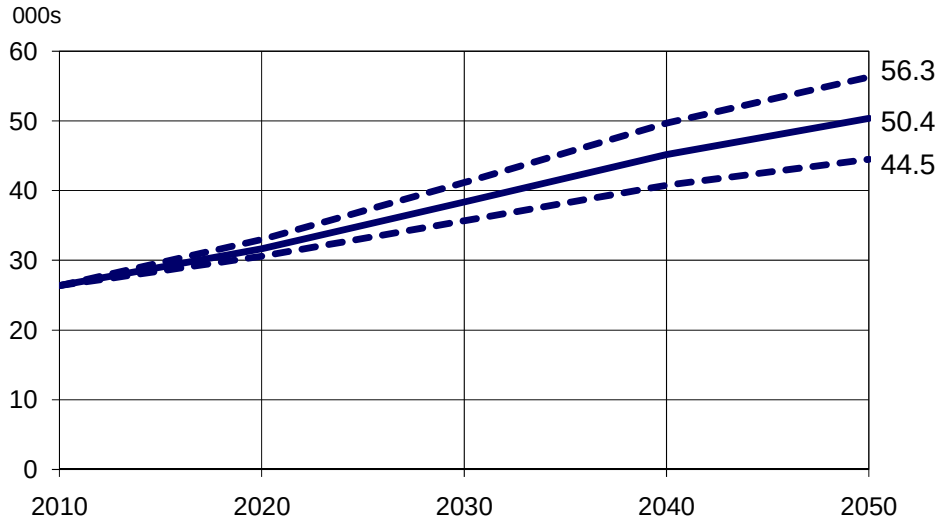


Figure 11
Reston Parkway Metro Station Area
Households Forecast Range, 2010 - 2050

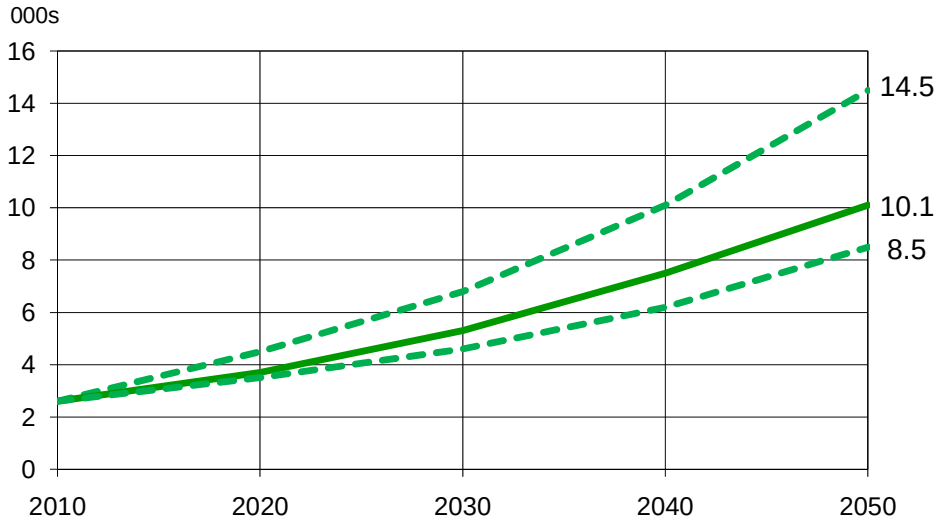


Figure 12
Reston Parkway Metro Station Area
Employment Forecast Range, 2010 - 2050

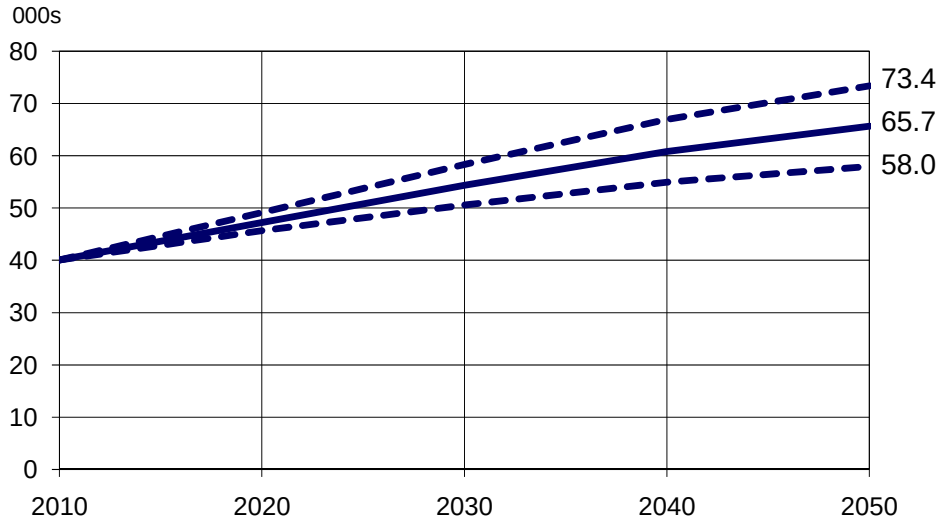


Figure 13
Herndon-Monroe Metro Station Area
Households Forecast Range, 2010 - 2050

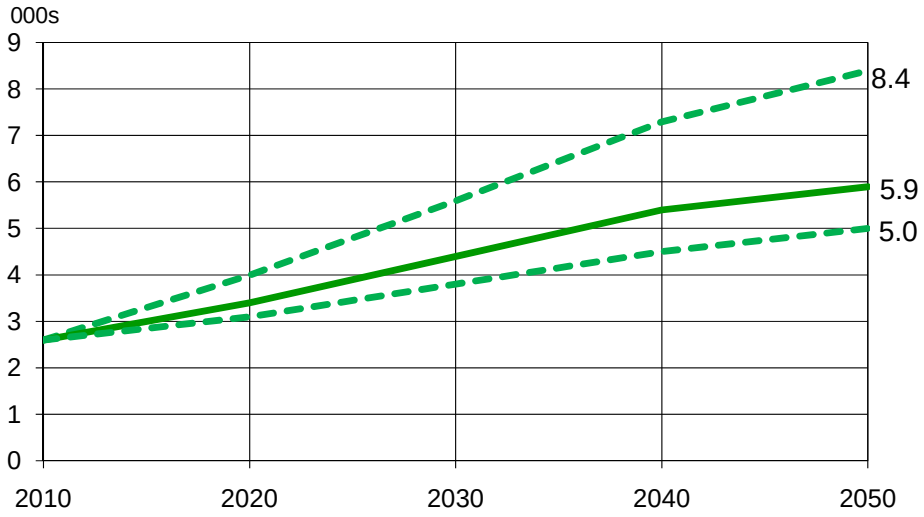


Figure 14
Herndon-Monroe Metro Station Area
Employment Forecast Range, 2010 - 2050

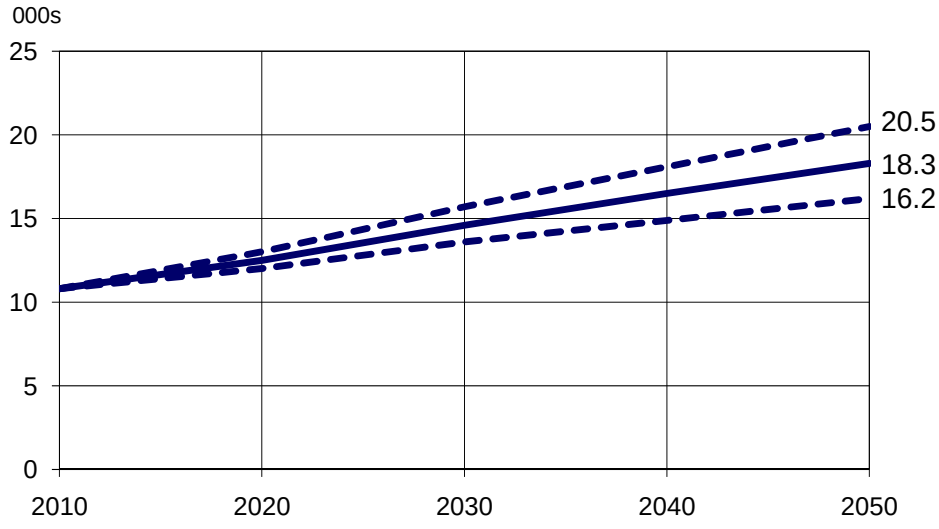


Figure 15
Route 28/CIT Metro Station Area
Households Forecast Range, 2010 - 2050

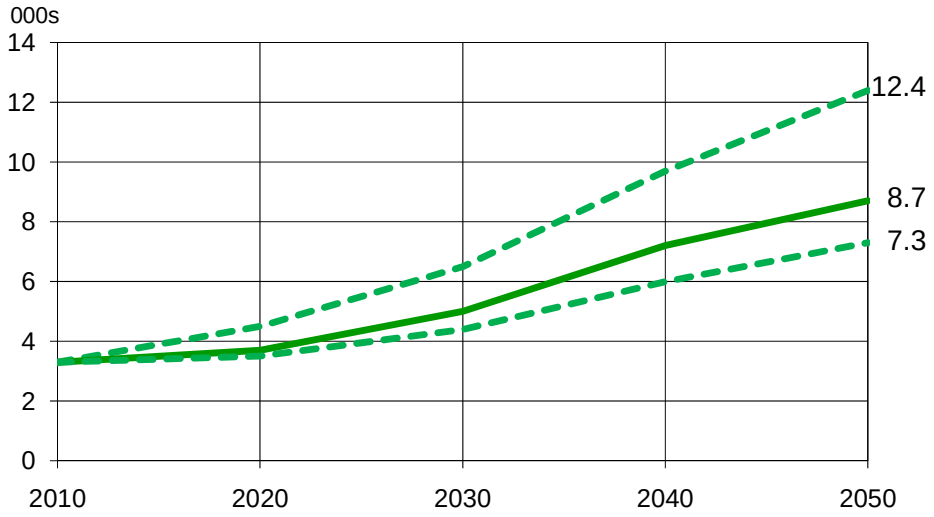


Figure 16
Route 28/CIT Metro Station Area
Employment Forecast Range, 2010 - 2050

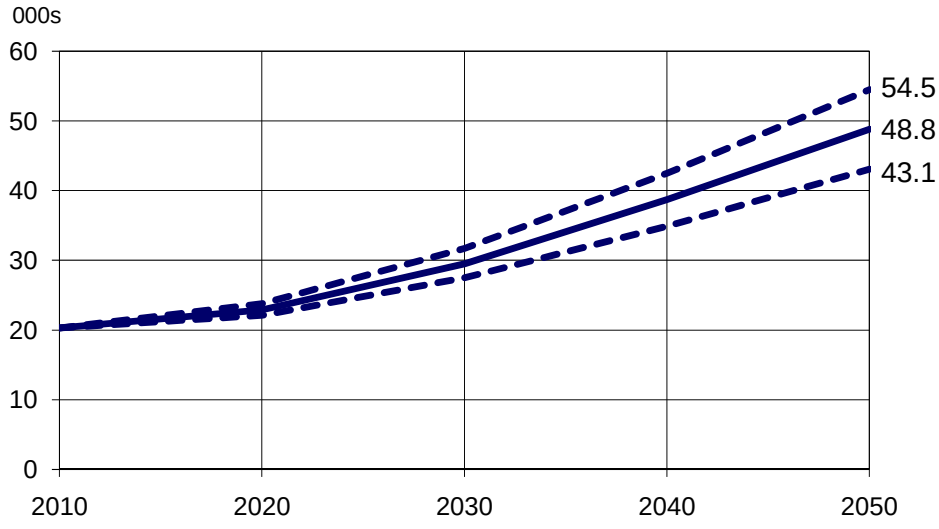


Figure 17
Route 28 Corridor
Households Forecast Range, 2010 - 2050

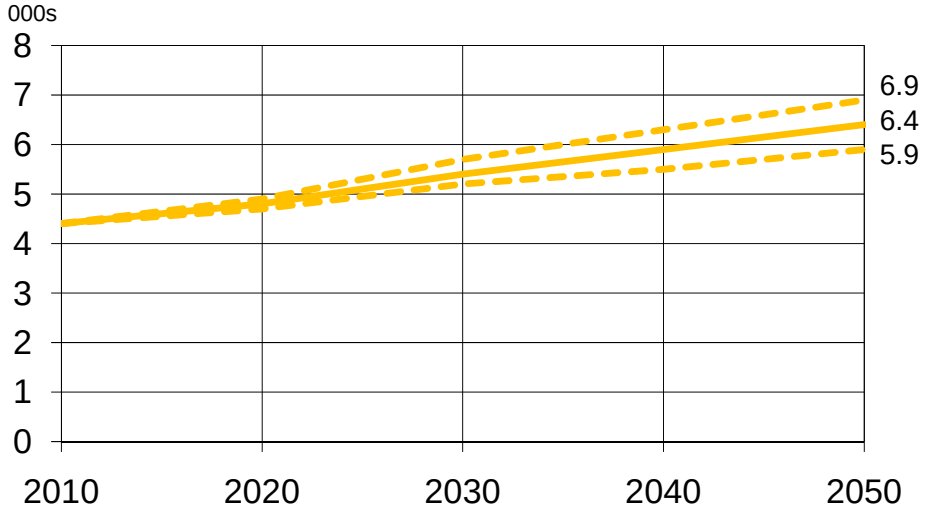


Figure 18
Route 28 Corridor
Employment Forecast Range, 2010 - 2050

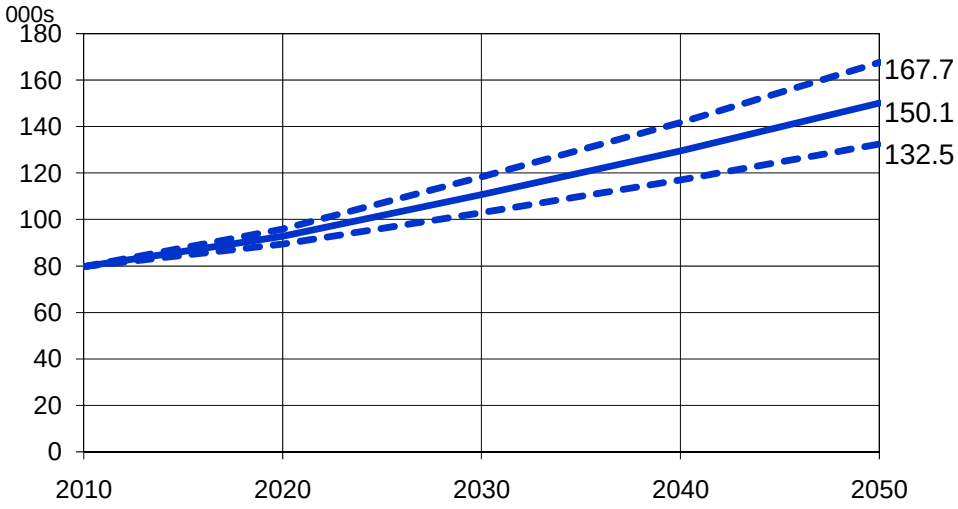


Figure 19
Station Area Share of Jobs
2010-2030-2050

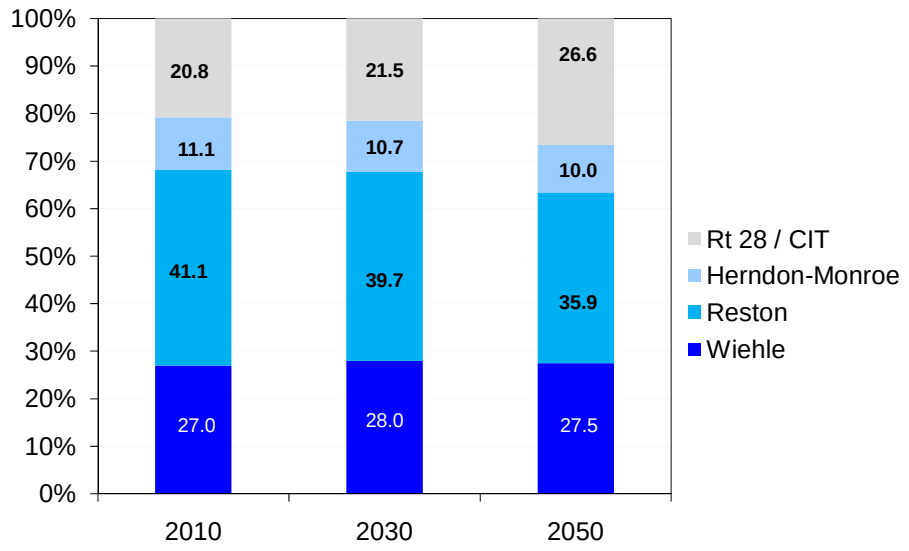
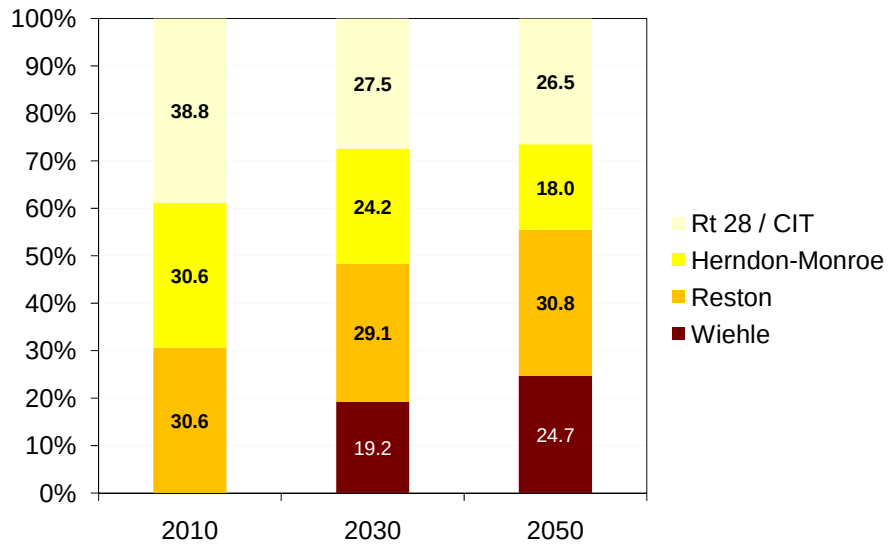


Figure 20
Station Area Share of Households
2010-2030-2050



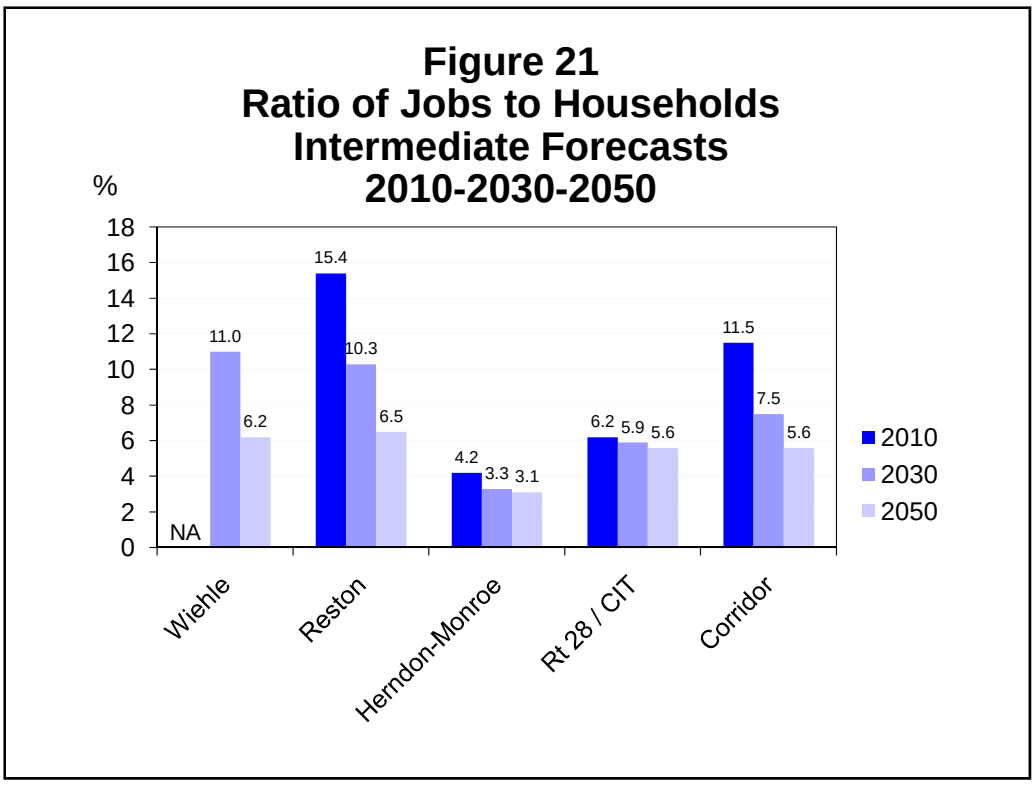


Figure 21
Ratio of Jobs to Households
Intermediate Forecasts
2010-2030-2050
%
18
16
14
12
10
8
6
4
2
0
NA
11.0
6.2
15.4
10.3
6.5
4.2
3.3
3.1
6.2
5.9
5.6
11.5
7.5
5.6
2010
2030
2050
Wiehle
Reston
Herndon-Monroe
Rt 28 / CIT
Corridor

Appendix

FORECASTS OF POPULATION, HOUSEHOLDS, JOBS AND DEVELOPMENT: 2010 - 2050
RESTON-DULLES METRORAIL CORRIDOR

	2010	2020	2030	2040	2050
Population					
Low	18,700	25,000	34,000	44,900	56,100
Intermediate	18,700	27,000	39,100	53,900	68,700
High	18,700	32,200	50,100	73,100	95,600
Jobs					
Low	97,600	110,400	127,300	145,500	161,800
Intermediate	97,600	114,400	137,000	161,400	183,200
High	97,600	118,900	147,000	177,400	204,700
Households					
Low	8,500	11,400	15,800	21,400	26,700
Intermediate	8,500	12,300	18,200	25,700	32,700
High	8,500	14,700	23,300	34,800	45,500
Residential Development (SF)					
Low	12,759,000	17,100,000	23,700,000	32,100,000	40,050,000
Intermediate	12,759,000	18,467,000	27,308,000	38,498,000	50,550,000
High	12,759,000	22,050,000	34,950,000	52,200,000	68,250,000
Non-Residential Development (SF)					
Low	31,558,000	35,760,000	42,985,000	50,289,000	59,192,000
Intermediate	31,558,000	37,057,000	46,270,000	55,814,000	67,036,000
High	31,558,000	38,447,000	49,574,000	61,396,000	74,879,000
Office Development (SF)					
Low	25,879,000	28,839,000	33,265,000	37,289,000	41,640,000
Intermediate	25,879,000	29,885,000	35,807,000	41,387,000	47,157,000
High	25,879,000	31,005,000	38,364,000	45,525,000	52,675,000
Retail Development (SF)					
Low	1,275,000	1,535,000	2,122,000	2,806,000	3,776,000
Intermediate	1,275,000	1,590,000	2,284,000	3,114,000	4,276,000
High	1,275,000	1,650,000	2,447,000	3,425,000	4,777,000
Other Non-Residential Development (SF)					
Low	4,404,000	5,387,000	7,598,000	10,193,000	13,776,000
Intermediate	4,404,000	5,583,000	8,179,000	11,313,000	15,602,000
High	4,404,000	5,791,000	8,763,000	12,445,000	17,428,000

Source: GMU Center for Regional Analysis

FORECASTS OF POPULATION, HOUSEHOLDS, JOBS AND DEVELOPMENT: 2010 - 2050
WIEHLE AVENUE METRO STATION AREA

	2010	2020	2030	2040	2050
Population					
Low	0	2,900	6,400	9,900	14,200
Intermediate	0	3,200	7,400	11,900	16,900
High	0	3,800	9,500	16,100	24,300
Jobs					
Low	26,400	30,600	35,700	40,800	44,500
Intermediate	26,400	31,700	38,400	45,200	50,400
High	26,400	33,000	41,200	49,700	56,300
Households					
Low	0	1,300	3,000	4,700	6,800
Intermediate	0	1,500	3,500	5,700	8,100
High	0	1,700	4,400	7,700	11,500
Residential Development (SF)					
Low	2,000	2,014,000	4,491,000	7,079,000	10,166,000
Intermediate	2,000	2,175,000	5,175,000	8,490,000	12,075,000
High	2,000	2,597,000	6,623,000	11,512,000	17,323,000
Non-Residential Development (SF)					
Low	8,104,000	9,393,000	12,018,000	14,021,000	16,813,000
Intermediate	8,104,000	9,734,000	12,937,000	15,562,000	19,040,000
High	8,104,000	10,099,000	13,861,000	17,118,000	21,268,000
Office Development (SF)					
Low	7,672,000	8,268,000	9,386,000	10,026,000	10,541,000
Intermediate	7,672,000	8,568,000	10,104,000	11,127,000	11,938,000
High	7,672,000	8,889,000	10,825,000	12,240,000	13,335,000
Retail Development (SF)					
Low	13,000	91,000	259,000	410,000	662,000
Intermediate	13,000	94,000	278,000	455,000	750,000
High	13,000	98,000	298,000	501,000	838,000
Other Non-Residential Development (SF)					
Low	419,000	1,034,000	2,373,000	3,585,000	5,609,000
Intermediate	419,000	1,072,000	2,555,000	3,979,000	6,353,000
High	419,000	1,112,000	2,737,000	4,377,000	7,096,000

Source: GMU Center for Regional Analysis

FORECASTS OF POPULATION, HOUSEHOLDS, JOBS AND DEVELOPMENT: 2010 - 2050
RESTON PARKWAY METRO STATION AREA

	2010	2020	2030	2040	2050
Population					
Low	5,800	7,600	9,900	13,100	17,800
Intermediate	5,800	8,200	11,400	15,700	21,200
High	5,800	9,800	14,600	21,200	30,400
Jobs					
Low	40,100	45,700	50,600	55,000	58,000
Intermediate	40,100	47,300	54,400	60,900	65,700
High	40,100	49,200	58,400	67,000	73,400
Households					
Low	2,600	3,500	4,600	6,200	8,500
Intermediate	2,600	3,700	5,300	7,500	10,100
High	2,600	4,500	6,800	10,100	14,500
Residential Development (SF)					
Low	3,951,000	5,195,000	6,914,000	9,332,000	12,738,000
Intermediate	3,951,000	5,610,000	7,967,000	11,192,000	15,135,000
High	3,951,000	6,699,000	10,196,000	15,175,000	21,707,000
Non-Residential Development (SF)					
Low	13,400,000	15,360,000	17,449,000	19,251,000	21,792,000
Intermediate	13,400,000	15,918,000	18,782,000	21,366,000	24,680,000
High	13,400,000	16,515,000	20,123,000	23,503,000	27,568,000
Office Development (SF)					
Low	10,345,000	11,893,000	13,110,000	13,807,000	14,772,000
Intermediate	10,345,000	12,324,000	14,112,000	15,324,000	16,729,000
High	10,345,000	12,786,000	15,119,000	16,857,000	18,686,000
Retail Development (SF)					
Low	688,000	782,000	981,000	1,232,000	1,591,000
Intermediate	688,000	810,000	1,055,000	1,367,000	1,802,000
High	688,000	841,000	1,131,000	1,504,000	2,013,000
Other Non-Residential Development (SF)					
Low	2,367,000	2,686,000	3,358,000	4,211,000	5,430,000
Intermediate	2,367,000	2,783,000	3,615,000	4,675,000	6,149,000
High	2,367,000	2,887,000	3,874,000	5,142,000	6,869,000

Source: GMU Center for Regional Analysis

FORECASTS OF POPULATION, HOUSEHOLDS, JOBS AND DEVELOPMENT: 2010 - 2050
HERNDON-MONROE METRO STATION AREA

	2010	2020	2030	2040	2050
Population					
Low	5,600	6,900	8,200	9,400	10,400
Intermediate	5,600	7,400	9,500	11,300	12,400
High	5,600	8,800	12,100	15,300	17,700
Jobs					
Low	10,800	12,000	13,600	14,900	16,200
Intermediate	10,800	12,500	14,600	16,500	18,300
High	10,800	13,000	15,700	18,100	20,500
Households					
Low	2,600	3,100	3,800	4,500	5,000
Intermediate	2,600	3,400	4,400	5,400	5,900
High	2,600	4,000	5,600	7,300	8,400
Residential Development (SF)					
Low	3,843,000	4,697,000	5,723,000	6,724,000	7,430,000
Intermediate	3,843,000	5,073,000	6,595,000	8,065,000	8,830,000
High	3,843,000	6,057,000	8,440,000	10,935,000	12,662,000
Non-Residential Development (SF)					
Low	3,355,000	3,614,000	4,118,000	4,820,000	5,238,000
Intermediate	3,355,000	3,745,000	4,433,000	5,349,000	5,932,000
High	3,355,000	3,886,000	4,749,000	5,884,000	6,625,000
Office Development (SF)					
Low	3,107,000	3,334,000	3,766,000	4,158,000	4,450,000
Intermediate	3,107,000	3,455,000	4,054,000	4,615,000	5,040,000
High	3,107,000	3,584,000	4,343,000	5,076,000	5,630,000
Retail Development (SF)					
Low	121,000	158,000	234,000	313,000	445,000
Intermediate	121,000	163,000	251,000	347,000	504,000
High	121,000	170,000	269,000	382,000	563,000
Other Non-Residential Development (SF)					
Low	127,000	123,000	118,000	349,000	342,000
Intermediate	127,000	127,000	127,000	388,000	388,000
High	127,000	132,000	136,000	426,000	433,000

Source: GMU Center for Regional Analysis

FORECASTS OF POPULATION, HOUSEHOLDS, JOBS AND DEVELOPMENT: 2010 - 2050
ROUTE 28 / CIT METRO STATION AREA

	2010	2020	2030	2040	2050
Population					
Low	7,300	7,600	9,400	12,600	15,300
Intermediate	7,300	8,200	10,900	15,100	18,200
High	7,300	9,800	13,900	20,400	26,100
Jobs					
Low	20,300	22,100	27,500	34,900	43,100
Intermediate	20,300	22,900	29,500	38,700	48,800
High	20,300	23,800	31,700	42,500	54,500
Households					
Low	3,300	3,500	4,400	6,000	7,300
Intermediate	3,300	3,700	5,000	7,200	8,700
High	3,300	4,500	6,500	9,700	12,400
Residential Development (SF)					
Low	4,964,000	5,194,000	6,571,000	8,965,000	10,941,000
Intermediate	4,964,000	5,609,000	7,572,000	10,752,000	12,995,000
High	4,964,000	6,697,000	9,691,000	14,579,000	18,645,000
Non-Residential Development (SF)					
Low	6,699,000	7,393,000	9,400,000	12,197,000	15,350,000
Intermediate	6,699,000	7,661,000	10,118,000	13,537,000	17,384,000
High	6,699,000	7,948,000	10,841,000	14,891,000	19,418,000
Office Development (SF)					
Low	4,755,000	5,344,000	7,003,000	9,299,000	11,877,000
Intermediate	4,755,000	5,538,000	7,538,000	10,320,000	13,451,000
High	4,755,000	5,746,000	8,076,000	11,352,000	15,024,000
Retail Development (SF)					
Low	453,000	504,000	649,000	851,000	1,078,000
Intermediate	453,000	522,000	699,000	944,000	1,221,000
High	453,000	542,000	748,000	1,039,000	1,363,000
Other Non-Residential Development (SF)					
Low	1,491,000	1,545,000	1,748,000	2,048,000	2,395,000
Intermediate	1,491,000	1,601,000	1,882,000	2,273,000	2,713,000
High	1,491,000	1,661,000	2,016,000	2,500,000	3,030,000

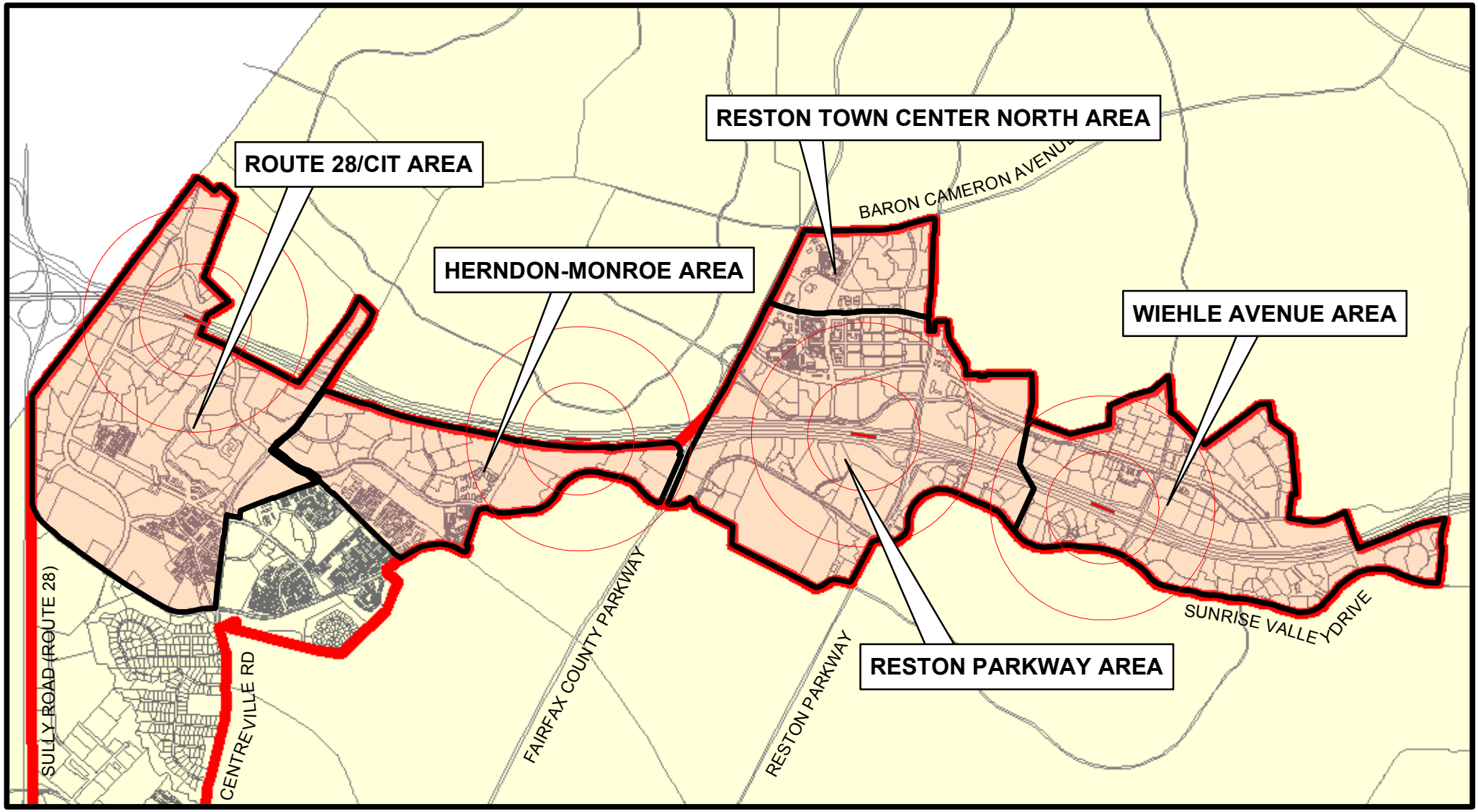
Source: GMU Center for Regional Analysis

FORECASTS OF POPULATION, HOUSEHOLDS, JOBS AND DEVELOPMENT: 2010 - 2050
ROUTE 28 CORRIDOR

	2010	2020	2030	2040	2050
Population					
Low	10,600	11,200	12,200	12,700	13,600
Intermediate	10,600	11,400	12,700	13,600	14,700
High	10,600	11,700	13,400	14,500	15,900
Jobs					
Low	79,800	89,500	103,000	117,100	132,500
Intermediate	79,800	92,800	110,700	129,500	150,100
High	79,800	96,000	118,400	141,900	167,700
Households					
Low	4,400	4,700	5,200	5,500	5,900
Intermediate	4,400	4,800	5,400	5,900	6,400
High	4,400	4,900	5,700	6,300	6,900
Residential Development (SF)					
Low	6,600,000	7,050,000	7,800,000	8,250,000	8,850,000
Intermediate	6,600,000	7,184,000	8,100,000	8,850,000	9,600,000
High	6,600,000	7,350,000	8,550,000	9,450,000	10,350,000
Non-Residential Development (SF)					
Low	27,510,000	32,118,000	38,598,000	44,211,000	49,502,000
Intermediate	27,510,000	33,062,000	41,207,000	48,510,000	55,597,000
High	27,510,000	34,029,000	43,821,000	52,959,000	61,744,000
Office Development (SF)					
Low	14,089,000	18,258,000	24,021,000	28,980,000	33,596,000
Intermediate	14,089,000	18,881,000	25,829,000	32,058,000	38,048,000
High	14,089,000	19,523,000	27,637,000	35,264,000	42,537,000
Retail Development (SF)					
Low	3,107,000	3,171,000	3,282,000	3,393,000	3,505,000
Intermediate	3,107,000	3,279,000	3,529,000	3,754,000	3,969,000
High	3,107,000	3,391,000	3,776,000	4,129,000	4,437,000
Other Non-Residential Development (SF)					
Low	10,313,000	10,689,000	11,295,000	11,837,000	12,401,000
Intermediate	10,313,000	10,901,000	11,849,000	12,698,000	13,580,000
High	10,313,000	11,115,000	12,407,000	13,566,000	14,769,000

Source: GMU Center for Regional Analysis

GMU Analysis of Reston-Dulles Corridor: Station Areas



Legend

- Station Areas (Data to be organized/analyzed by station area)
- Reston-Dulles GMU Analysis Area
- Parcels within Analysis Area
- General Location of Planned Metro Stations

Note: Circles denote 1/4 and 1/2 mile radius from station

0 0.5 1 Miles

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